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Wealthtech Weekly

May 22, 2025

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Reporter

In the years I've been covering AI in wealth management, I've read study after study exploring implementation roadblocks. (Access? Education? Lack of support?) None of them seems to take into account that what's stopping some advisors from embracing the technology is that they're against it on general principle. This week, I spoke to a few of them.

How do you feel about using generative AI in content creation? Let me know — robert.burgess@arizent.com.

I hope you'll check out the article, along with the rest of this week's stories.

As always, thank you for reading. Talk to you next Thursday!

Connect with Rob:

TOP STORIES

TECHNOLOGY

Some advisors rage against the machine learning

When it comes to certain AI tools — like those for content creation — concerns over copyright infringement, bland outputs and more have led some financial advisors to eschew the technology.

- **How AI reduced the need for a virtual assistant: Show Me Your Stack**
  Gabriel Kaplan of Wealth Habits used to give his virtual assistant around 20 hours per month of work. AI tools in his tech stack have greatly reduced that amount.
- **Diversification through luxury watches? Advisors have thoughts**

A new study explored the benefits of adding timepieces to portfolios of stocks, bonds and gold.

- **AI a small part of wealth firm budgets, but that may change**
  While recent Financial Planning research found many firms have only a single-digit percentage of their tech budgets allocated to AI, three-quarters of those surveyed said they plan to spend at least somewhat more in the next year.
- **CFP Board missteps, LPL Financial's legal woes: Top news October 2024**
  In October's roundup of pressing issues in the wealth management space, learn about the CFP Board's problematic advertising campaign, LPL Financial's ongoing recruitment court battles against rival Ameriprise and more.

Read the latest in Wealthtech

Michael Kitces joins ADVISE AI 2025 PLUS registration is OPEN!

Register today for the industry's can't-miss event.

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